

Guiding Principles

Leveraging Technology

Designate Key People

- Individual or group to maintain pleading document templates
- Individual or group to regularly check and disseminate updates/changes in ECF procedure
- Organize staff members involved in eFiling initiatives on a routine basis to discuss experiences involving eFiling both locally and nationally

Key Law Firm strategies

- Create a basic survival kit handbook (preferably in electronic form) including eFiling procedures, tips and contact information for support
- Create a secure system in which the firm has the ability to electronically file documents on an absentee attorneys behalf
- Create a workable solution wherein both staff and attorney feel comfortable managing eFilings that occur after 5:00 pm

Key Law Firm strategies

- Schedule periodic training sessions
- Create shortcuts to ECF website areas
 - > Web-Links from the Windows "Start" menu
 - > Add to Web Browser Favorites/Bookmarks
 - > Hyper-links in word processing document(s)



- Create guidelines for the IT/IS department
 - > Document management systems
 - PDF software
 - > Word Processing software
 - > eMail management guidelines
 - > Web browser

Create a IT/IS checklist

Skills Training Checklist for IT Staff

Windows - 2000/XP

- Managing Folders, including view options
- Windows Explorer
- O File Management
- O Sorting files by name, date, type
- O Saving files to the correct location!
- Cut, Copy and Paste
- Deleting files
- Copying files
- Moving files
- Searching for files
- File Directory structures (desktop, C: drive, network drives)
- File extensions (wpd, pdf)
- o right-mouse clicking

Adobe Acrobat 5/6

- O Printing to a file (from wordprossesor)
- O Naming a file
- Viewing a file
- O Copy and paste text
- o navigating through a document
- O display preferences full page vs. page width
- O Editing a file limited text editing

Wordprocessing Software

- O Printing to pdf
- O Turn off auto-capitalization
- File, Save vs. File, Save As
- O Setting a default location for File, Open

E-mail Software

- Attachments
- Virus recognition

Browser Training

- O What is a browser? Internet Explorer and Netscape
- O Use of the Back button
- Reload/refresh

Other Guiding Principles – Filing In Other States

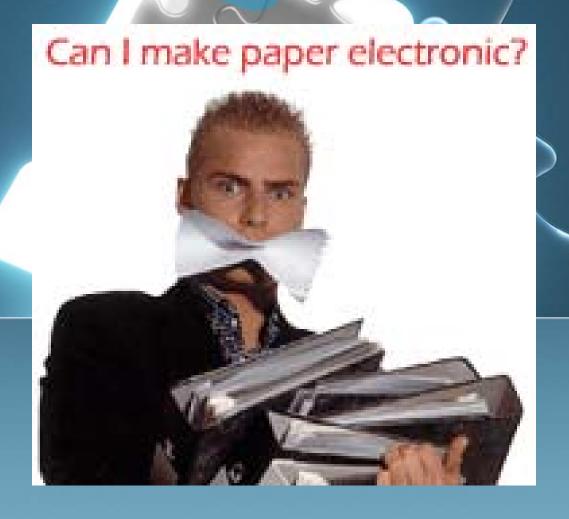
 Create an electronic reference guide for each state and district where your firm files

 Highlight the differences between that state and MN

Other Guiding Principles – Filing In Other States

- Do you have everything?
 - Word compliance
 - Certificate of service
 - Create a checklist

What is electronic, stays electronic!





- Create folders in your email inbox folder
- Create folders that interact with your Document Management System (DMS)
- Setting "Rules" to manage ECF notices

Managing Pleading files

 Designate key players to retrieve and manage your Pleading files who are responsible for...

 Ask - Where to store pleading type documents?

Use your Documents Management System

Use your Litigation Support Software

Managing Pleading files

- Copy your pleadings along with you on a laptop when you need to be mobile
- You can access the PDF's and email them to your client or 3rd parties
- Create associations for further fact finding, research, responding, or similar case strategy initiatives

And Lastly – Other Things to Think About

- Rules on signatures and paper copies for your firm
- Deadlines for attorneys to have filings prepared for same day filing. ex. 3:00 p.m.
- Managing your login and password
- Filing errors
- Communicating when document is ready for ECF posting